

Amended Telefile Worksheet

PREPARE FOR YOUR AMENDED TELEFILE CALL
BY COMPLETING THIS WORKSHEET. RETAIN THIS
WORKSHEET FOR YOUR RECORDS. DO NOT MAIL.

Your Social Security number _____ Spouse's Social Security number _____

Your "Total tax for 1999" from line 13 of your Telefile worksheet \$ _____

1. Correct filing status: Single (from head of household) ☐ Head of household (from single) ☐

2. Correct number of dependents ☐ Were any dependent members of household under age 12 as of 12/31/99? ☐ Yes ☐ No.

Social Security numbers of dependents _____

3. Total number of Form(s) W-2 for you ☐ for your spouse ☐.

4. Employer Identification Number	5. Amount of State Wages and Tips	6. YOUR Amount of Soc. Sec./Retirement	7. SPOUSE'S Amount of Soc. Sec./Retirement	8. Amount of Mass. Withholding
1st W-2				
2nd W-2				
3rd W-2				
4th W-2				
5th W-2				
TOTALS:	5. \$	6. \$	7. \$	8. \$
AMOUNT OF DIFFERENCE:	5. \$	6. \$	7. \$	8. \$

Amended Telefile will provide the amounts that should be entered in the shaded boxes.

9. Unemployment compensation additional amount . . .	\$	CORRECTED TOTAL	9. \$
9a. Mass. withholding additional amount.	\$	CORRECTED TOTAL	9a. \$
10. Mass. bank interest amount of increase/decrease . . .	\$	CORRECTED TOTAL	10. \$
11. Winnings and fees additional amount	\$	CORRECTED TOTAL	11. \$
11a. Mass. withholding additional amount.	\$	CORRECTED TOTAL	11a. \$
12. Rent paid in 1999 (List your landlord's name) _____	\$	CORRECTED TOTAL	12. \$
13. Earned Income Credit. Enter number of qualifying children <input type="checkbox"/> . Enter amount from U.S. return	\$		
Social Security numbers of dependents _____			

After completing this worksheet, you are ready to amend your Telefile return. Call (617) 660-2033.

14. Amended tax for 1999	\$	16. Amended amount you owe	\$
15. Amended amount of your refund	\$	(Pay by credit or check card — see page 13 for more information). If you paid by credit or check card, enter your authorization number here: _____	

"Sign" your return. You (and your spouse, if filing jointly) must be present to authenticate the filing of your Amended Telefile return. This recording will serve as your lawful signature for this return. Amended Telefile will assign you a new 9-digit confirmation number. Do not hang up until you receive this number, it is your proof of filing.

Confirmation Number _____ Date of amended filing ____/____/____

Filing An Amended Telefile Worksheet

You should file an Amended Telefile Worksheet if your original return was filed and accepted through Telefile at least four business days ago, you have access to a touch-tone telephone and you meet any of the following criteria:

- You did not previously claim the Earned Income Credit on Telefile;
- You are amending your filing status only to single (from head of household) or to head of household (from single);
- You are amending the number of dependents claimed;
- Your income that is being amended comes from one or more of the following sources **only** — wages and/or tips reported on Form W-2, unemployment compensation, Massachusetts bank interest, and winnings and fees;
- You are reporting only **additional** and/or **corrected** W-2 information, such as wages, tips, state withholding and Social Security withholding as reported on Form(s) W-2, W-2C or 1099-G, or **additional** unemployment compensation or winnings and fee income as reported on Form(s) 1099, 1099-G or 1099-MISC;
- You are increasing or decreasing the amount of Massachusetts bank interest or the amount of rent paid **only**;
- You are amending the dependent member under age 12 deduction; and
- The total number of Form(s) W-2 reported between Telefile and Amended Telefile does not exceed five.

If you do not meet the above criteria for filing an Amended Telefile Worksheet, you must file a Massachusetts Amended Income Tax Return, Form 33X. This form is available by calling the Customer Service Bureau at (617) 887-MDOR or by calling the Fax on Demand system at (617) 887-1900 using the handset and the keypad on your fax machine and entering code 339.

Step-By-Step Instructions

Enter your Social Security number, and your spouse's (if married filing jointly) and the amount of "Total tax for 1999" from line 13 of your original 1999 Telefile Worksheet.

Line 1 If you are changing your filing status, check the appropriate box.

Line 2 Enter the correct number of dependents (do not include yourself or spouse). You will be asked if any dependent members of household were under age 12 as of 12/31/99. In the spaces provided, enter the Social Security number(s) of any additional dependent(s).

Amended Telefile will provide amended amounts for the following information. These amounts should be entered in the shaded boxes.

Line 5 Enter on the lines in column 5 the amount of wages/tips from **all** Form(s) W-2.

Lines 6 and 7 Enter on the lines in column 6 for yourself, and in column 7 for your spouse, the amount paid to Soc. Sec., U.S., R.R. or Mass. retirement **plus** Medicare from **all** Form(s) W-2.

Line 8 Enter on the lines in column 8 the amount of Mass. Income Tax withheld from **all** Form(s) W-2.

Add the amounts down the columns in **Lines 5** through **8** and enter these totals in the appropriate

white boxes. These are the amounts you will need when you make your call.

Line 9 Enter the amount of additional unemployment compensation received from Form(s) 1099.

Line 9a Enter the amount of additional Mass. withholding from Form(s) 1099-G.

Line 10 Enter the amount of increase or decrease of Massachusetts bank interest from all Form(s) 1099.

Line 11 Enter the amount of additional winnings/fee income from all Form(s) W-2G, 1099 and/or 1099-MISC.

Line 11a Enter the amount of additional Mass. withholding from all Form(s) W-2G, 1099 and/or 1099-MISC.

Line 12 Enter the correct amount of rent paid in 1999.

Line 13 Enter the number of qualifying children, if any, and then enter the federal Earned Income Credit amount from your U.S. Form 1040, line 59a; 1040A, line 37a; 1040EZ, line 8a; or U.S. Telefile Tax Record, item K.

Lines 14 through 16 Amended Telefile will automatically compute the correct tax amount for 1999, as well as the additional amount of your refund or amount you owe. These amounts should be entered in the shaded boxes.

TaxTalk

TaxTalk is DOR's automated system of recorded tax information available 24 hours a day, 7 days a week. Call (617) 887-MDOR or toll-free in Massachusetts 1-800-392-6089, and press option 3 for TaxTalk, to select from a menu of tax topics. TaxTalk topics are also available through DOR's Fax on Demand system or via DOR's website at www.state.ma.us/dor. For a menu of TaxTalk topics available on Fax on Demand, please call (617) 887-1900 using the handset and keypad on your fax machine and, when prompted, enter document retrieval number 4000. To access the TaxTalk topics through DOR's website, click on "Help/Resources." TaxTalk includes information on what's new for tax year 1999 as well as answers to commonly asked questions concerning personal income tax, sales and use tax, meals tax, withholding tax, room occupancy excise, sales tax on motor vehicles, corporate excise, partnerships, estate tax, and your rights as a taxpayer.

Credit or Check Card Payment

If Telefile determines that you owe tax, you have the option of paying this amount with your MasterCard, Visa, Discover or Novus brand card. To do so, you will be required to enter your account number and the four-digit expiration date (month and year) after authenticating your return. You should have your credit or check card information readily available. This option is not available for PC filers.

Note: You can pay with your MasterCard, Visa, Discover or Novus brand card only during your original Telefile call. The appropriate amount will be credited to your Department of Revenue account on the next business day.

If You Need to Send a Payment

Complete the Amended Telefile Payment Voucher by including the following information:

1. Your name, and spouse's name if filing a joint return, and address;
2. Your Social Security number, and spouse's Social Security number if filing a joint return; and
3. The amount of the enclosed payment.

If you do not make full payment of the tax due on or before April 18, 2000, you will be sent a Notice of Assessment (NOA). This notice will show your tax due, plus any interest and penalty assessments for late payment.

Amended Telefile Payment Voucher				1999 Massachusetts Department of Revenue
First name	M.I.	Last name	Social Security number	
Spouse's first name	M.I.	Last name	Spouse's Social Security number	
Street address			Amount enclosed	
			\$	
City/Town	State	Zip		

Mail to: Massachusetts Department of Revenue, PO Box 7062, Boston, MA 02204
Make check payable to: Commonwealth of Massachusetts. Write your Social Security number on your check or money order.

